

Initial Statement of Reasons/Plain English

Overview/Non Controlling Summary

Regulation 6001

Specific Purpose

The Board is required, by Government Code section 87306, to amend its Conflict of Interest Code when necessitated by changed circumstances such as the addition of a new classification that makes or participates in making decisions or the deletion of a classification that is no longer in use. Such changed circumstances at the Board necessitate this proposed amendment to the Code.

Factual Basis

Regulation 6001, with Appendices A and B, is required by the Political Reform Act, which is found in Government Code section 81000 – 91015. Regulation 6001 incorporates by reference the standard Conflict of Interest Code adopted by the Fair Political Practices Commission in Title 2 California Code of Regulations, section 18730. Appendix A lists all designated positions and the applicable designated disclosure categories. Appendix B describes the reporting requirements of each disclosure category.

The proposed changes to Appendix A reflect the classification and organizational changes that have taken place at the Board since the Code was last amended.

The following sets forth the specific changes to Appendix A.

BOARD

- Add the District Director, Community Affairs Deputy and Associate Tax Auditor classifications which are currently being used.
- Delete the “II” after the Business Taxes Specialist and Information Officer classifications.
- Change the disclosure categories for the Deputy to Board Member, Administrative Assistant to Board Member, Assistant to Board Member and CEA classifications from All to 1-7 to more accurately reflect the reporting obligations of the positions.
- Change the disclosure categories for the Administrative Assistant and Staff Services Manager classifications from 1-8 to 1-7 to more accurately reflect the reporting obligations of the positions.

EXECUTIVE

- Delete the CEA (Communications Office) classification which has been moved from the Executive Office to the External Affairs Department.
- Change the disclosure categories for the Executive Director and Administrative Assistant classifications from All to 1-7 to more accurately reflect the reporting obligations of the positions.

BOARD PROCEEDINGS DIVISION

- Delete the Associate Governmental Program Analyst (LAN Workgroup Manager classification which is currently not being used.
- Change the disclosure categories for the CEA and Staff Services Manager classifications from All to 1-7 to more accurately reflect the reporting obligations of the positions.

CUSTOMER AND TAXPAYER SERVICES DIVISION

- Delete the heading Customer and Taxpayer Services Division which is currently not being used.
- Delete the CEA classification which is currently not being used.
- Delete the Staff Services Manager, Business Taxes Compliance Specialist, Assistant Tax Services Specialist, Associate Governmental Program Analyst, Associate Information Systems Analyst, Staff Services Manager (Forms and Publications Section), Assistant Tax Services Specialist (Forms and Publications Section) and Associate Governmental Program Analyst (Forms and Publications Section) classifications which have been moved from the Customer and Taxpayer Services Division to the Customer Service and Publishing and Outreach Services Division.

INTERNAL SECURITY AND AUDIT DIVISION

- Add the Internal Security and Audit Division which has been moved from the Legal Department to the Executive.
- Add the Staff Services Manager classification which is currently being used in the Internal Security and Audit Division.
- Delete the Associate Tax Auditor, Staff Information Systems Analyst, and Assistant Tax Services Specialist classifications which are currently not being used.
- Change the disclosure categories for the CEA and Business Taxes Administrator classifications from All to 1-8 to more accurately reflect the reporting obligations of the positions.
- Change the disclosure categories for the Associate Governmental Program Analyst classification from 7-9 to 7,8 to more accurately reflect the reporting obligations of the positions.
- Change the disclosure categories for the Systems Software Specialist and Associate Information Systems Analyst classifications from 8 to 1-8 to more accurately reflect the reporting obligations of the positions.

LEGISLATIVE DIVISION

- Change the name of the Legislative Division to Legislative and Research Division.

LEGISLATIVE AND RESEARCH DIVISION

- Add the Tax Counsel classification which is currently being used in the Legislative and Research Division.
- Change the disclosure categories for the Assistant Chief Counsel and CEA classifications from All to 1-7 to more accurately reflect the reporting obligations of the positions.
- Delete the classification of Senior Specialist Property Appraiser which is currently not being used.

TECHNOLOGY SERVICES DIVISION

- Change the disclosure categories for the CEA and Data Processing Manager IV classifications from All to 1-7 to more accurately reflect the reporting obligations of the positions.

TAXPAYERS' RIGHTS AND EQUAL EMPLOYMENT OPPORTUNITY DIVISION

- Add the Tax Counsel (TRA), Senior Specialist Property Appraiser, Assistant Property Appraiser and Associate Governmental Program Analyst (TRA) classifications which are currently being used in the Taxpayers' Rights and Equal Employment Opportunity Division.
- Change the term "EEOO" to "EEO" to reflect the Equal Employment Opportunity designation of the division.
- Change the disclosure categories for the CEA classification from All to 1-7 to more accurately reflect the disclosure obligations of the classification.
- Change the disclosure categories for the Business Taxes Specialist (TRA) classification from 1-4 to 1-5 to more accurately reflect the disclosure obligations of the classification.

EXTERNAL AFFAIRS DEPARTMENT

- Add the External Affairs Department which oversees the Communications Office and Web and Media Services Division and the Customer Service and Publishing and Outreach Services Division.
- Add the CEA classification which has been moved from the Customer and Taxpayer Services Division to the External Affairs Department.

CUSTOMER SERVICE AND PUBLISHING AND OUTREACH SERVICES DIVISION

- Add the Staff Services Manager, Business Taxes Compliance Specialist, Assistant Tax Services Specialist, Associate Governmental Program Analyst, Associate Information Systems Analyst, Staff Services Manager (E-Publishing), Assistant Tax Services Specialist (Editorial Services Section) and Associate Governmental Program Analyst (E-Publishing) classifications which have been moved from the Customer and Taxpayer Services Division to the Customer Service and Publishing and Outreach Services Division.

COMMUNICATIONS OFFICE AND WEB AND MEDIA SERVICES DIVISION

- Add the Communication Office and Web and Media Services Section
- Add the Information Officer II, Senior Information Systems Analyst Supervisor, Tax Services Specialist (E-Publishing), Associate Information Systems Analyst, Associate Programmer Analyst, Assistant Information Systems Analyst, Staff Programmer Analyst, Associate Governmental Program Analyst, Business Taxes Specialist II, and Staff Information Systems Analyst which are currently being used.

ADMINISTRATION DEPARTMENT

- Delete the Training Officer (Training Office) and Associate Governmental Program Analyst (Training Office) classifications which have been moved to Policy, Planning, and Workforce Development.
- Add the Staff Services Manager III, Data Processing Manager III (Administration, Information Security Officer) and Senior Information Systems Analyst (Specialist, Administration) classifications which are currently being used in the Administration Department.

- Change the disclosure categories for the CEA classification from All to 1-7, 9 to more accurately reflect the reporting obligations of the position.

ADMINISTRATIVE SUPPORT DIVISION

- Delete the Associate Business Management Analyst and Associate Governmental Program Analyst classifications which are currently not being used.
- Change the disclosure categories for the CEA classification from All to 1-7 to more accurately reflect the reporting obligations of the position.

PERSONNEL MANAGEMENT DIVISION

- Delete the Personnel Management Division which has now been designated Human Resources Division.

HUMAN RESOURCES DIVISION

- Add the Human Resources Division which is the new designation for the former Personnel Management Division.

FINANCIAL MANAGEMENT DIVISION

- Add the Accounting Administrator (Specialist) and Research Program Specialist classifications which are currently being used.
- Delete the Staff Information Systems Analyst (Specialist) classification which is currently not being used.
- Change the disclosure categories for the CEA classification from All to 1-7 to more accurately reflect the reporting obligations of the position.

POLICY PLANNING AND EVALUATION DIVISION

- Delete the Policy Planning and Evaluation Division which has now been designated Policy, Planning, and Workforce Development.

POLICY PLANNING AND WORKFORCE DEVELOPMENT

- Add Policy Planning and Workforce Development which is the new designation for the former Policy Planning and Evaluation Division.
- Add the Associate Information Systems Analyst and Staff Services Manager (Training office) classifications which are currently being used in Policy Planning and Workforce Development.
- Add the Training Officer (Training Office) and Associate Governmental Program Analyst (Training Office) classifications which have been moved from the Administration Department to Policy, Planning and Workforce Development.

LEGAL DEPARTMENT

- Add the Business Taxes Compliance Supervisor (Special Procedures), Business Taxes Compliance Specialist (Special Procedures), Business Taxes Specialist (Special Procedures), Business Taxes Specialist II (Disclosure Officer), Staff Services Analyst (Disclosure Assistant), Business Taxes Specialist I and Associate Governmental Program Analyst classifications which are currently being used in the Legal Department.
- Change the disclosure categories for the CEA and Assistant Chief Counsel classifications from All to 1-7 to more accurately reflect the reporting obligations of the positions.

INTERNAL SECURITY AND AUDIT DIVISION

- Delete the Internal Security and Audit Division which has been moved from the Legal Department to the Executive.

INVESTIGATIONS DIVISION

- Add the Administrative Assistant classification which is currently being used in the Investigations Division.
- Change the disclosure categories for the CEA classification from All to 1-7 to more accurately reflect the reporting obligations of the position.

PROPERTY AND SPECIAL TAXES DEPARTMENT

- Add the Business Taxes Administrator III and Business Taxes Specialist classifications which are currently being used in the Property and Special Taxes Department.
- Delete the Staff Services Manager classification which is currently not being used in the Property and Special Taxes Department.
- Change the disclosure categories for the CEA classification from All to 1-7 to more accurately reflect the reporting obligations of the position.

ASSESSMENT POLICY AND STANDARDS DIVISION

- Delete the Assessment Policy and Standards Division which has been combined with the County Property Tax Division and renamed County Assessed Properties Division.
- Delete the CEA, Principal Property Appraiser, Senior Specialist Property Appraiser, Senior Specialist Property Auditor Appraiser, Supervising Property Appraiser, Associate Property Appraiser, and Associate Property Auditor Appraiser classifications which have been moved from the Assessment Policy and Standards Division to the County Assessed Properties Division.
- Delete the Research Analyst II (GIS) classification which has been moved to the State Assessed Properties Division

COUNTY PROPERTY TAX DIVISION

- Delete the County Property Tax Division which has been combined with the Assessment Policy and Standards Division and renamed County Assessed Properties Division.

COUNTY ASSESSED PROPERTIES DIVISION

- Add the County Assessed Properties Division which combines the Assessment Policy and Standards Division and County Property Tax Division into one unit designated as County Assessed Properties Division.
- Change the disclosure categories for the CEA classification from 3, 4, 7-9 to 1-7 to more accurately reflect the disclosure obligations of the position.
- Delete the term “Assessment Practices Surveys Section” from the Supervising Property Appraiser, Senior Specialist Property Appraiser, Senior Specialist Property Auditor Appraiser, Associate Property Appraiser and Associate Property Auditor Appraiser classifications. The term is no longer used in the County Assessed Properties Division.

- Delete the Supervising Property Appraiser (Timber Tax Section), Senior Specialist Property Auditor Appraiser and the Associate Property Auditor Appraiser (Timber Tax Section) classifications which are currently not being used.
- Add the Business Taxes Specialist II, Junior Property Appraiser, Assistant Property Appraiser and Assistant Property Auditor Appraiser classifications which are currently being used.

VALUATION DIVISION

- Delete the Valuation Division which has now been designated State Assessed Properties Division.

STATE ASSESSED PROPERTIES DIVISION

- Add the State-Assessed Properties Division which is the new designation for the former Valuation Division.
- Change the disclosure categories for the CEA classification from 3,7-9 to 1-7 to more accurately reflect the reporting obligations of the classification.
- Add the Research Manager I (GIS) classification which is currently being used.
- Add the Research Manager II (GIS) classification which has been moved from the Assessment Policy and Standards Division to the State Assessed Properties Division.

ENVIRONMENTAL FEES DIVISION

- Add the Environmental Fees Division.
- Add the CEA, Business Taxes Administrator, Business Taxes Compliance Supervisor, Business Taxes Compliance Specialist, Supervising Tax Auditor, Business Taxes Specialist and Associate Tax Auditor classifications which are currently being used in the Environmental Fees Division.

EXCISE TAXES AND FEES DIVISION

- Delete the Excise Taxes and Fees Division which has been renamed Excise Taxes Division.

EXCISE TAXES DIVISION

- Add the Excise Taxes Division which is the new designation for the former Excise Taxes and Fees Division.
- Change the disclosure categories for the CEA classification from 1, 2, 7, 9 to 1-7 to more accurately reflect the reporting obligations of the position.
- Add the Business Taxes Administrator classification which is currently being used in the Excise Taxes Division.

FUEL TAXES DIVISION

- Change the disclosure categories for the CEA and Business Taxes Administrator classifications from 1, 2, 7-9 to 1-7 to more accurately reflect the disclosure obligations of the positions.
- Delete the Staff Services Manager classification which is currently not being used.

SALES AND USE TAX DEPARTMENT

- Add the Senior Information Systems Analyst Classification which is currently being used in the Sales and Use Tax Department.

- Change the disclosure categories for the CEA classification from All to 1-7 to more accurately reflect the reporting obligations of the position.

CONSULTANT

- Change the disclosure categories from All to 1-7 to more accurately reflect the disclosure obligations of the classification.
- Change the term “category” to “categories” to correct a typographical error.